SiteManager Training Manual

Module A
Chapter 1

Contract Administration
Contract Records

Section A-2-10-1

Entering Checklist Event Date Information

Student's Version
Indiana Department of Transportation
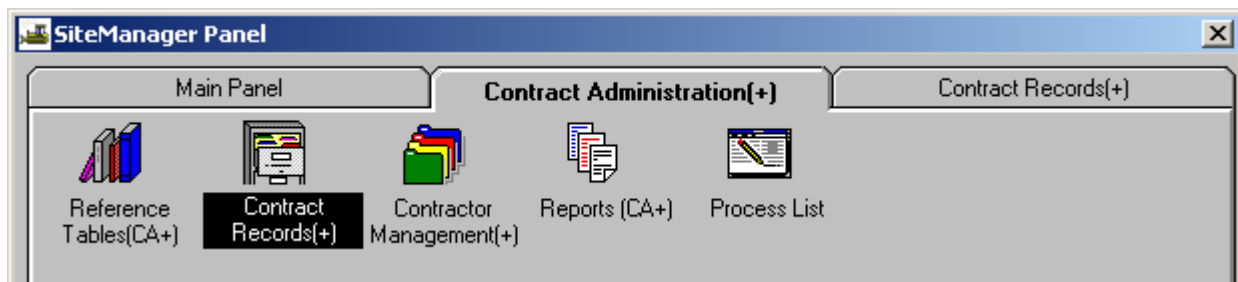October 2007, Version 3.7b

This page intentionally left blank
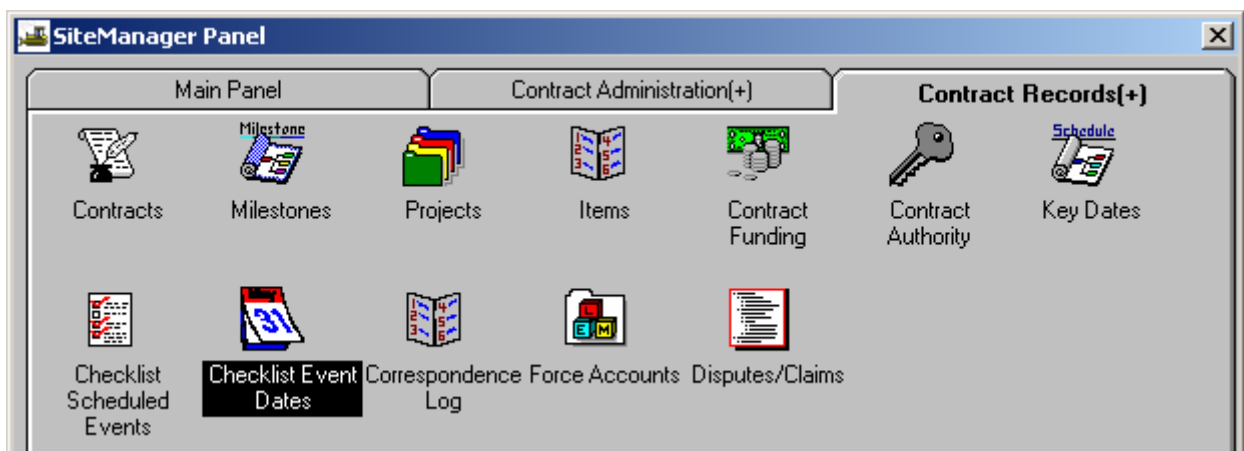
Entering Checklist Event Date Information

This document will explain how to enter Actual Dates into a Checklist Event.

"Double-click" on **Contract Administration (+)** located on the Main Panel.

"Double-click" on **Contract Records (+)**.

"Double-click" on **Checklist Event Dates**.

The Select Contract window opens.

The Bottom Panel contains the following columns:

- **Contract ID:** is the identification number assigned to the contract.
- **Vendor ID:** is the INDOT assigned identification number for the Prime Contractor.
- **Fed State Proj Nbr**: is the unique identifier for the project.
- **Status**: column indicates current status of the project, Active, Pending, Complete, or Archived.
- **County**: column shows the county where the majority of the work is located.
- **Lvl 2**: The **Lvl 2** column indicates the District Office administering the contract.
- **Lvl 3:** The **Lvl 3** column is not utilized by INDOT.
- **Lvl 4:** The **Lvl 4** column is not utilized by INDOT.
- **Location Description 1:** the **Location Description 1** column is the description of the actual work location.

Use the Find, Filter or Sort functions to locate the appropriate Contract.

"Double-click" on the appropriate **Contract ID**.

"Click" on the appropriate **Event Type** located in the top panel.

"Click" on the **New** ▯ button.

Click in the Bottom Panel.

Projected Date: **Projected Date** is the date the event was projected to occur. The Projected Date is set up in the Checklist Scheduled Events window.

Actual Date: **Actual Date** is the date the Checklist Event occurs.

"Click" in the **Actual Date** field. This date is associated with the date of the highlighted **Event Type** located in the top panel.

"Enter" the date of the event in mm/dd/yy format.

"Click" in the **Comments** field located in the bottom panel.

"Enter" any comments associated to the event. 60 character/spaces are allowed in this field.

"Click" the **Save** 🖫 button.

If the event occurs more than one time, repeat the process to enter additional dates.

An entry in the bottom panel can be deleted by "clicking" the entry and "clicking" the **Delete** 📝 button located on the toolbar

"Click" the Yes button if the date entry is to be deleted.

"Click" the **Save** 💾 button located on the toolbar.
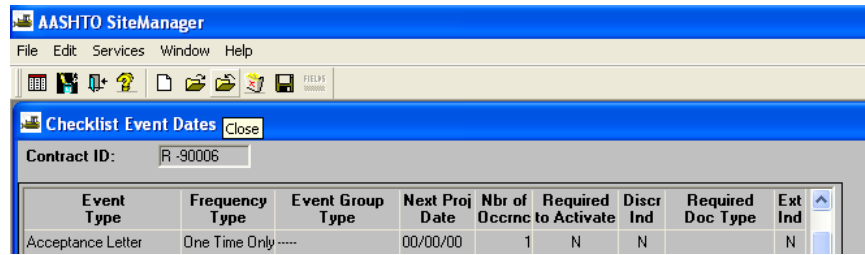
"Click" on the **Close** button located on the toolbar.

A-2-10-1 Group Exercise

The material certification letter was received from the contractor and reviewed on November 2, 2006 for contract R -90006. Update SiteManager to reflect the information.

Double-click on Contract Administration
Double-click on Contract Records
Double-click on Checklist Event Dates
Double-click on Contract R -20006

Select Checklist Event   Material Certification
Click the New
Enter   Actual Date   11/02/06.
Save
Close